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**WO 01/91351 A2**

(54) Title: METHOD FOR CONTACTING CUSTOMERS AND PROSPECTIVE CUSTOMERS

(57) Abstract: A method for contacting customers and prospective customers and providing an effective scheduling and communication system is provided.

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## METHOD FOR CONTACTING CUSTOMERS AND PROSPECTIVE CUSTOMERS

### Background of the Invention

The current mode of communication between sales representatives and prospective customers is by telephone and mail. Sales representatives spend significant amounts of time trying to contact customers and schedule appointments, time that could be spent more productively in meeting with clients and serving their needs. Therefore, a method for efficiently identifying and contacting potential customers, introducing the company's services and/or products and arranging and scheduling appointments is needed.

### Summary of the Invention

The present invention is specifically designed to improve the effectiveness of communication between sales representatives and customers and prospects and to generate and manage an appointment schedule generated from these communications. The present invention allows the sales representative to communicate more effectively by adding a face and a personality to the transmission to the customer. The immediate and real-time accessibility of the representative's itinerary allows customers to conveniently schedule an appointment.

### Detailed Description of the Invention

The invention comprises an e-mail messaging system offering video, audio and text messaging designed primarily to generate appointment schedules for sales and marketing professionals. The sales representatives utilize a video camera to record personalized messages to be sent to sales prospects as a personal introduction and to request an

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appointment. The invention provides a package that allows sales representatives to easily record and transmit videos to the server from the convenience of their desktop computer, with the ease of Web-based point and click execution. Video  
5 recorders or standard and digital recorders are also capable of being converted to the proper format.

The invention utilizes the World Wide Web or "Web". As is well known to those of skill in the art, the Web refers to both a distributed collection of interlinked, user viewable  
10 hypertext documents, commonly referred to as Web documents or Web pages, that are accessible via the Internet and client and server software components which provide user access to such documents using standardized Internet protocols. Currently, the primary standard protocol for allowing applications to  
15 locate and acquire Web documents is HTTP and Web pages are encoded using HTML. As is known to those of skill in the art, in a distributed system, a program at one site sends a request to a program at another site and waits for a response. The requesting program is referred to as the "client" and the  
20 program which responds is called the "server". In the context of the Web, the client is a Web browser which runs on the computer of the user and the program which responds to the browser is commonly referred to as a Web server. In the present invention, Videosalesrep maintains a Web site which  
25 is a computer system that serves informational content over a network using the standard protocols of the Web and corresponds to the Internet domain name Videosalesrep. As used herein, the term is intended to cover both the hardware/software server components that serve the information  
30 content over the network and back end hardware and software components that interact with the server components to perform services for Web site users, such as generating automatic E-mail and reports.

The company message along with an appointment calender  
35 and message center comprise the sales representative's record which is stored on the server. Streaming video is a powerful

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multimedia tool that allows real-time viewing of video without the requirement for downloading or uploading at either end of the transaction. The result is a dynamic, cost effective exchange of information. As an example, a typical 25 MB  
5 message would take nearly an hour to download on a standard dial-up modem, basically eliminating any chance of being viewed by a customer. However, streaming video, hosted on a server, is available for viewing within fifteen seconds of entering the site. During this brief waiting period, the  
10 customer can view company information such as company logo and other information which is typically included on a business card. This information will remain on the screen while the video is played.

The message would be in text and/or video format  
15 accompanied by a still image and/or streaming video of the sales representative seeking to secure an appointment with the customer. The customer's E-mail address would be requested and may be entered by the customer into the record. The customer may access the representatives appointment calender  
20 and request an appointment at a convenient time. The appointment can be confirmed by E-mail either automatically or after the sales representative reviews his record and customer contacts and requests.

Built into the program is the unique ability for the  
25 sales representative's monthly schedule to be attached to the message and accessed by the customer. The schedules can be managed on the server and may be used in management reports to the sales representative's supervisors. All appointment requests may be confirmed by automatically generated E-mail,  
30 copying the sales representative, the prospective customer and if desired, the company's management. Each visit to a site will be captured by the server. Records of visitors, including E-mail addresses and time spent on the site is provided on a weekly or monthly basis to the representative  
35 and his company. In addition to providing valuable marketing

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feedback, this data can be used for future E-mail marketing efforts.

Additional applications include video messages for account follow-up, special promotions, administrative issues  
5 and customer entertainment occasions.

Once the sales representative has recorded the desired video productions, they are uploaded to the Videosalesrep server for storage and transmission to designated recipient. Sales representatives' itineraries are continually updated and  
10 stored for retrieval. For those video messages that are not responded to either by an appointment commitment or return E-mail, a reminder message may be transmitted for a term and frequency designated by the sales representative.

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**What is claimed is:**

1. A method for contacting customers and prospective customers comprising:
  - creating a record for a sales representative which
  - 5 introduces the sales representative and their company to customers and prospective customers and maintains an appointment calender and message center for the sales representative;
  - storing the record on a server;
  - 10 providing a means for accessing the server so that a customer can access and review the record, make an appointment on the calender and/or leave a message for the representative; and
  - providing a means for reviewing and responding to the
  - 15 calender and messages from customers.
2. The method of claim 1 further comprising a means for company supervisors to access and review the record for customer contacts.